1. **Interview the trainer assigned to your practice prior to the actual training. A preliminary telephone call should be able to address any concerns or questions.**
   - ❑ Ask how long the trainer has been conducting onsite trainings.
   - ❑ Observe speech patterns for clarity and conciseness.
   - ❑ Track how long it takes the trainer to get the information back to you (e.g., outline or syllabus for the session(s)).

2. **Work with your trainer prior to the training to develop a plan to make sure that time is not wasted coordinating the session(s) during the actual scheduled training time. Time is money!**
   - ❑ Obtain an outline indicating what topics will be covered including the amount of time that will be dedicated to each topic/section.
   - ❑ Determine specifics: which groups of users will be trained – when, and on which topics or areas of the application.
   - ❑ Coordinate break times and lunches; basically set some ground rules.
   - ❑ Work with vendor to understand the setup needed for training environment (e.g., # of PCs, software installation, Internet connection, etc.).
   - ❑ Allow for enough time for your trainer to perform any necessary research (i.e., It's probably not a good idea to contact the trainer the day before your training with a list of concerns.).

3. **Assess staff's PC skill set.**
   - ❑ Identify your super-user(s). If possible provide early training for them so they can re-enforce what they already have learned and, possibly, help with the overall group session(s).
   - ❑ Prior to EHR training, provide additional basic PC skills training for the less savvy users.

4. **Develop a diagramed workflow processes that the trainer can review prior to training.**
   - ❑ Work with staff to develop workflow processes so the session(s) go smoothly, the correct material is covered and the correct personnel are trained.
   - ❑ Great opportunity to assess and fix potential process inconsistencies.

5. **Make sure appropriate training space is available and set up prior to the session(s).**
   - ❑ Coordinate with onsite or 3rd party IT vendor to have necessary hardware and software installed for session(s).
   - ❑ Work with trainer to make sure the training environment will be ready to go prior to actual session(s).

6. **Coordinate with staff when session(s) will be held.**
   - ❑ Promote the session(s) as a positive chance for the staff to better themselves and the practice.
   - ❑ Make sure the staff is aware this is their time. Encourage them to take advantage of training by asking questions and voicing their concerns on how the class is progressing.

7. **Make sure to have plenty of rest the night before and to have a vitalizing breakfast.**
   - ❑ Bring in breakfast foods to snack on before class begins (e.g., fruit, doughnuts, etc.).
   - ❑ Avoid any activities that will leave you exhausted the morning of the session.

8. **Take notes during the training session.**
   - ❑ Notes can be used to develop in-house training manuals to be used in conjunction with vendor manuals.
   - ❑ Consider taking notes on a hard copy user manual, which is usually provided by the trainer. You can use sticky tabs to mark pages with pertinent information.
   - ❑ Help the trainer teach at a comfortable pace by alerting him/her when additional time is required to note important information.
   - ❑ Your written notes may be more easily understood later than a user manual.

9. **Take plenty of breaks and schedule ample time for lunch without exhausting too much of the training time. Again, time is money!**
   - ❑ Coordinate with the trainer how and when breaks and lunch should be taken.
   - ❑ Coordinate with the group when lunch will be taken. Offer to order in or take a short drive to a local restaurant. If someone opts to not join the group reiterate when the training will resume.

10. **Take responsibility for the training. Work with the trainer to ensure your organization's needs are met.**
    - ❑ After the first day's session ask staff how the day went. Analyze the training yourself.
    - ❑ After the first day ask the trainer how he/she felt the session went.
    - ❑ Don't hesitate to ask questions or voice concerns. If the trainer doesn't know there is a problem, the problem can't be resolved.
    - ❑ If questions should arise that are outside the scope of your trainer's knowledge ask that he/she document those questions and to follow up with you once the questions can be answered. Do your own due diligence and follow up with the trainer if a response hasn't been provided in a set timeframe.

11. **Don't stress it! There will be a learning curve.**
    - ❑ Focus on the task at hand!
    - ❑ Work together with your peers. If you're a solo physician follow up with another physician in your area using the software. The vendor should be able to help you get in touch with other physicians.
    - ❑ Take advantage of user forums for further education.
    - ❑ Ask as many questions as your mind and time will allow.